Scheduling an Appointment
Information for healthcare professionals

Purpose:	To provide instructions on scheduling a BC Virtual Visit appointment.

> **NOTE:** BC Virtual Visit enables the connection between clients and providers; it does not replace your existing scheduling solution. It is important to ensure that you document any missed or "left without being seen (LWBS)" appointments in your existing EMR or scheduling solution to ensure accuracy.

Capturing a Client's Email and Consent

If this is a client's first BC Virtual Visit appointment, you will be **required to obtain their email address** as well as consent to use their email for BC Virtual Visit.

Email addresses and consent are collected to support the delivery of client care, to communicate information about the client's health and care, and to keep the client informed about Island Health's care and services.

When capturing consent, it is important to ask your clients to review the Electronic Communication/Virtual Health - Information for Patients to Consider document outlining potential risks associated with electronic communication. You can provide your client a copy or refer them to review the document on the BC Virtual Visit webpage.

At this time consent can be captured in one of two ways: when registration/scheduling the encounter or verbally and then charting consent in the appropriate location.

1. At the point of registration or scheduling when an encounter is created or updated in Cerner (In PM Office Under the **Address Tab**) consent can be captured by:
    a. Typing the email address provided by the client in the email address field.
        i. Confirm you have recorded the correct email address with the client by stating it back.
    b. In the consent to use email field, Select Yes from the drop down if the patient consents, see example below.


```
Email Address:                    Consent to use email:
PrimaryCare@Testing.com           Yes                      ▼
```

Verbal consent can be captured as part of the clients record as per standard charting process (Such as Cerner, Paper, Authorization for Electronic Communications Form)

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Confirming Client Email and Available Devices

Prior to scheduling a BC Virtual Visit appointment, it is important to confirm the following:

1. Client Email Address
   a. We know a client's email address may change at any point. It is important to confirm the clients email address is still correct each time a BC Virtual Visit appointment notification is sent at scheduling. If you need to update the client's email please see the instructions below.
2. Client's comfort level with technology or using a web based virtual application, and access to a suitable device. Key things to review when scheduling include:

☐	Does the client have an active email address that they use regularly?
☐	Does the client have access a device they can use for BC Virtual Visit appointments?
☐	Does the client plan to use an iPhone or iPad for their BC Virtual Visit Appointment?
☐	Is the client comfortable downloading the BC Virtual Visit application from the app store, if they do not have it already installed?
☐	Does their device have built-in microphone and camera? (e.g. client has used Skype or FaceTime)
☐	Does the client device have Google Chrome, Firefox, Edge or Safari?
☐	Does the client have a reliable Internet connection in the space they will be having their appointment?

IMPORTANT: If this is the client's first virtual appointment, recommend they prepare for the visit **ahead of time**, by reviewing the **Tips for a Successful Appointment** on the BC Virtual Visit Webpage.

Encourage clients to complete a self-test of their device to confirm their audio and video can connect to BC Virtual Visit so support a successful virtual care visit. This can be completed from the Island Health website at: islandhealth.ca/BC Virtual Visit or by calling the **BC Virtual Visit Patient support desk at 1-844-442-4433** (Monday to Friday 7am – 5p.m)

For first time users it is helpful to enquire what kind of device your client has and provide a little guidance in advance (details are available to them on the website so that they can do this in advance of the appointment):

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Apple iPhone or iPad	Download the **BC Virtual Visit Application** on their iPhone or iPad.
	  a. Encourage the Client to do so in advance of their visit.
	  b. Detailed instructions can be found on the Island Health website at: islandhealth.ca/BC Virtual Visit

Mac Computer or Desktop	Download the **Teladoc Health Desktop Application**. a. Encourage the Client to do so in advance of their visit.

www.islandhealth.ca/bcvirtualvisit

Technical Support: Clinical Solutions Desk x18777 or 250-370-8777 (Local Victoria) or 877-563-3152 (Toll Free)

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	b. Detailed instructions can be found on the Island Health website at: islandhealth.ca/BC Virtual Visit c. Clients may also join via the Chrome and Firefox browsers if they are uncomfortable with downloading the Desktop application. The Safari browser will no longer be supported after May 10th 2020.
Windows PC or Laptop	Download the **Teladoc Health Desktop Application**. a. Encourage the Client to do so in advance of their visit. b. Detailed instructions can be found on the Island Health website at: islandhealth.ca/BC Virtual Visit c. Clients may also join via the Chrome and Firefox browsers if they are uncomfortable with downloading the Desktop application

Scheduling a BC Virtual Visit Appointment

1. In the left navigation bar, select **Schedule**.
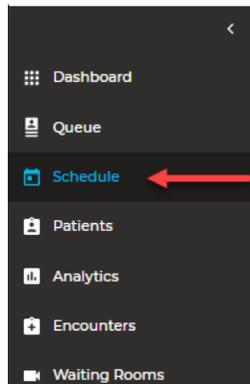
2. Click *Schedule* on the top right corner.
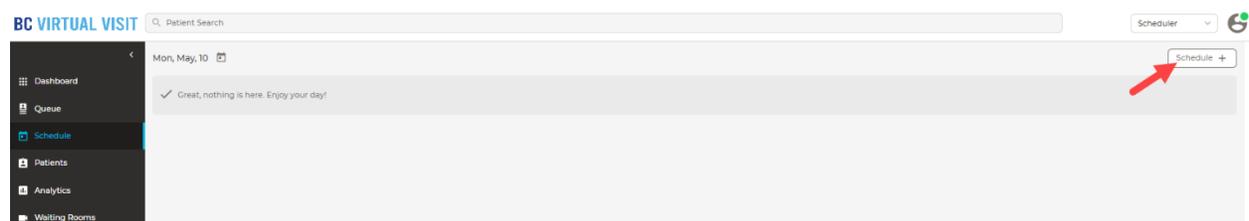
3. Type the client's name into the *Name/ID* field and select the client from the list.
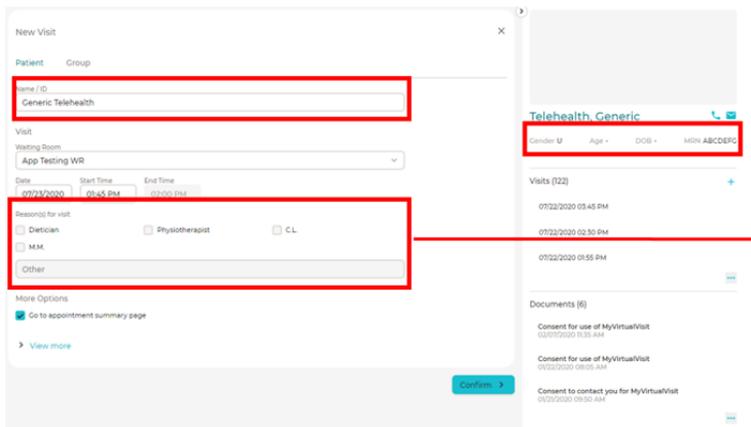

NOTE: you may also add a reason for visit to this appointment by choosing one of the pre-determined options or entering a free text in the "Other" field

4. Confirm the correct client has been selected by reviewing **DOB** and **PHN**.
5. Select the desired date and time for the appointment using the *date picker*.
6. Select the preferred appointment **duration** time from the dropdown.
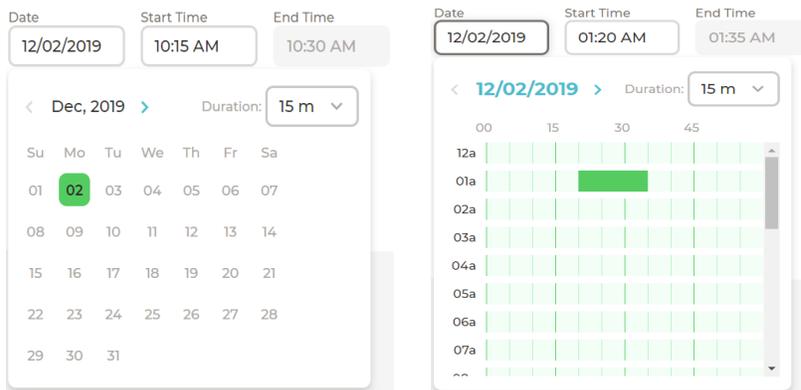
7. Click the **Start Time** field.
   ▪ Click the time when you want the appointment to start. The green bar will adjust to your selection (as shown in the image above).
   ▪ The End Time field will autofill based on the duration selected.

8. Click **Confirm** at the bottom of the page to send an email invitation to your client.
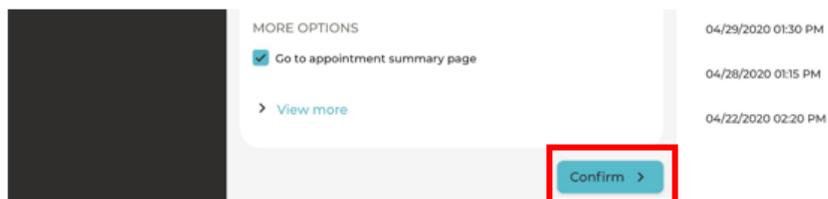
9. You will now see the appointment summary page, indicating you have successfully scheduled this appointment.
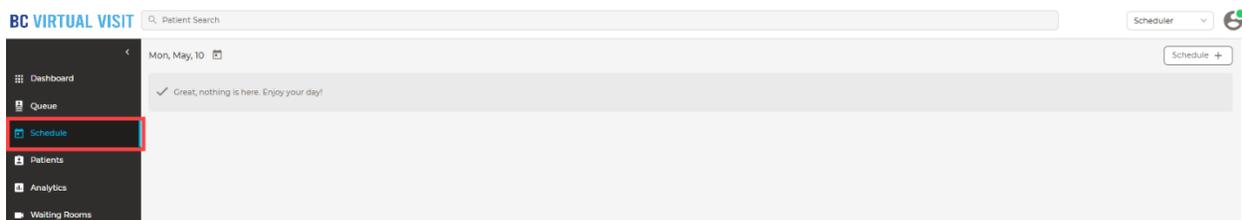

Cancelling, Re-sending and Modifying or Adding a Reason for Visit for a BC Virtual Visit Appointment

The following sections walks you through how to navigate to the Appointment Summary page where you will be able to cancel, re-send or modify a reason for visit for an existing **BC Virtual Visit** appointment.

1. Select *Schedule* from the left navigation bar.

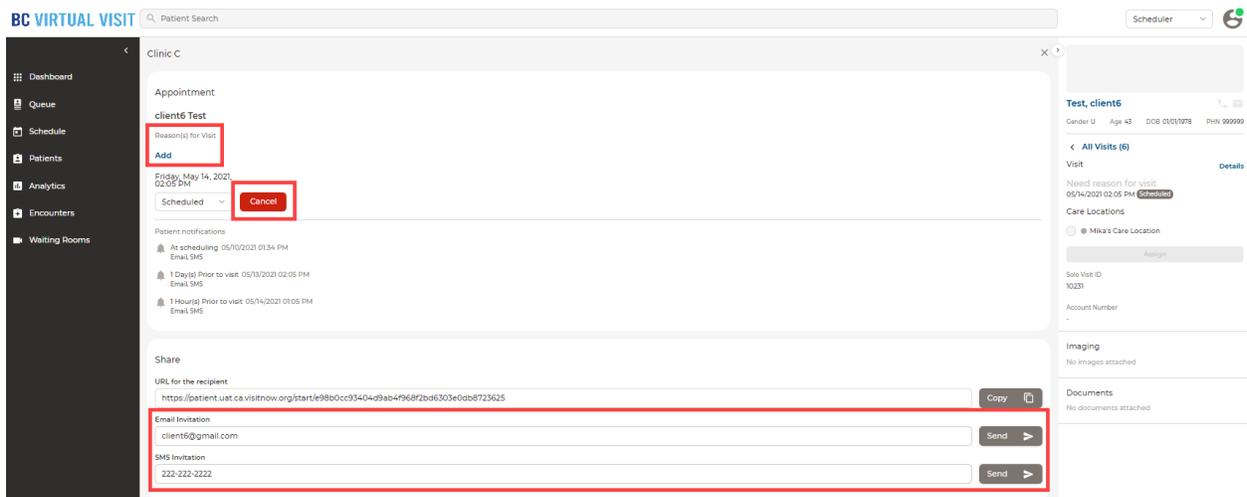2. Select the date at the top, and use the date picker to select the date you wish to view.
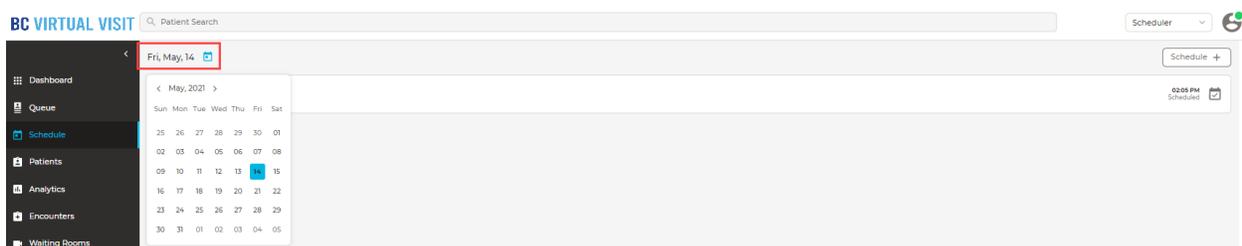
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3. Select the appointment you wish to cancel, re-send or modify/add a reason for visit. Then click on **Details** on the right navigation bar.
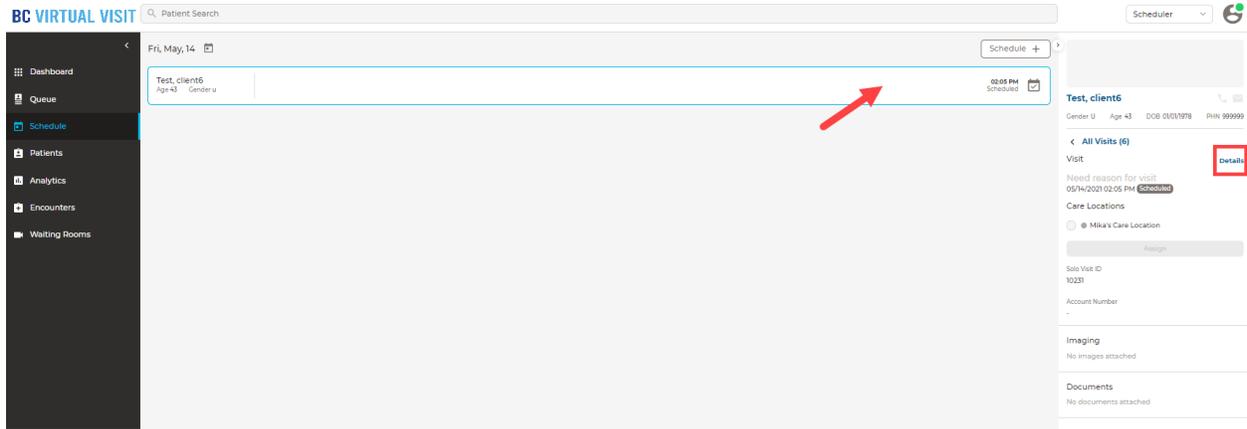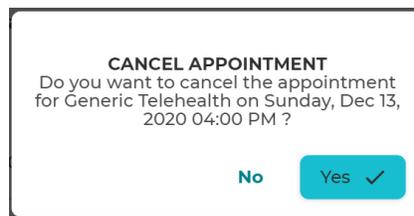

4. You will now be taken to the Appointment Summary page as shown below, where you may choose to cancel, re-send, and add or modify a reason for visit for an existing BC Virtual Visit Appointment.

Cancelling a BC Virtual Visit Appointment

1. In the appointment summary page above, click *Cancel*. A pop up will display, then click *Yes* to confirm. The client will receive an email, SMS (text) message or both depending on the contact information listed in their profile.

Re-Sending a BC Virtual Visit Appointment Invitation

This section is intended to provide instructions for re-sending an existing appointment invitation to your client in cases where they may have misplaced their invitation and would like to receive a new one.

1. In the Appointment Summary page above, click on *Send* next to the client's email. By doing so, a new appointment invitation will be sent to your client.

Adding or Modifying a Reason for Visit for an Existing BC Virtual Visit Appointment

1. **Adding a Reason for Visit:** In the Appointment Summary page above, click on *Add* underneath Reason for Visit, and then choose one of the pre-determined options or enter a free text. Once you have selected your reason for visit, click *Save.*
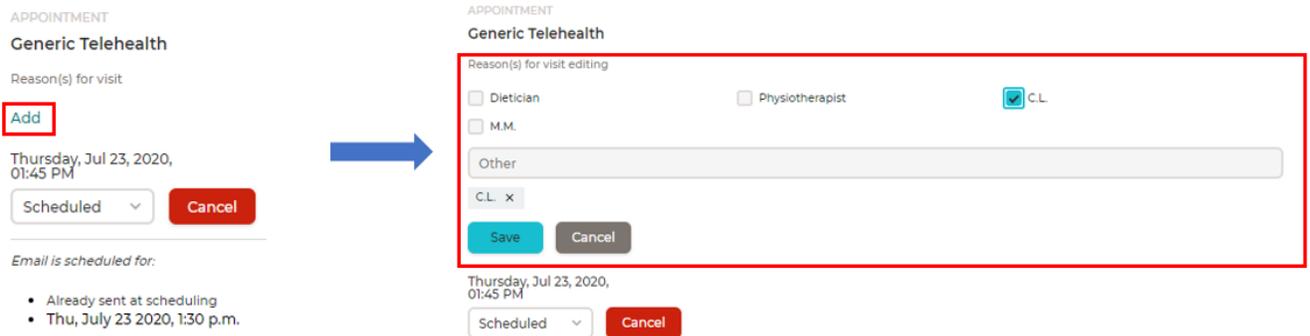
2. **Modifying a Reason for Visit:** If you had an existing reason for visit for your BC Virtual Visit appointment, you can modify it by following the same steps. Instead of an *Add* option, you will see an *Edit* option.
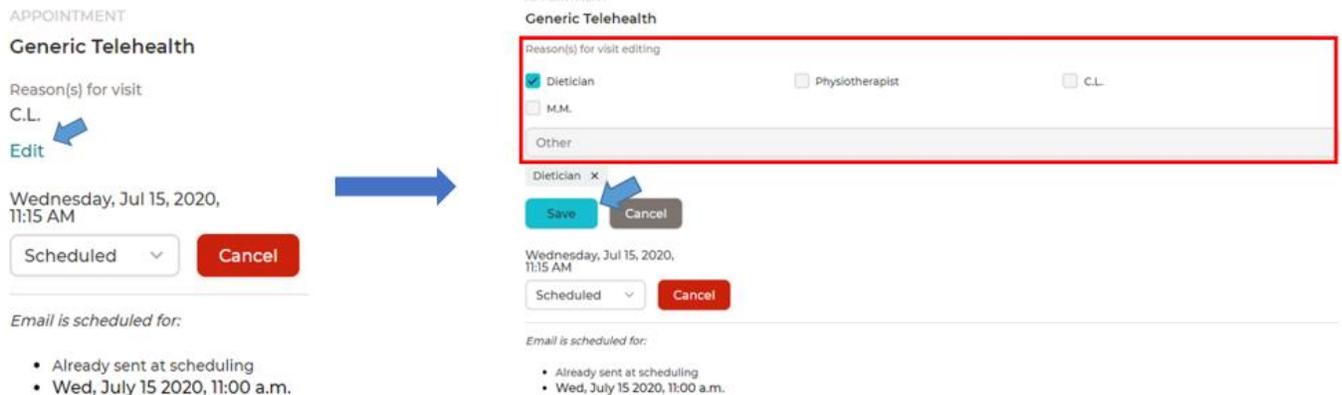
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Updating a Client's Email in BC Virtual Visit

> **NOTE:** A client's email should only be updated in BC Virtual Visit when consent is gained as per first section of this document "Capturing a Client's Email and Consent".

1. Search and select the client profile whose email you wish to update.
2. Click on the client's name on the right navigation panel.
   - The client's profile and demographic information will come up in the center window.
3. Click the *pencil icon* located in the top-right corner of the center window.
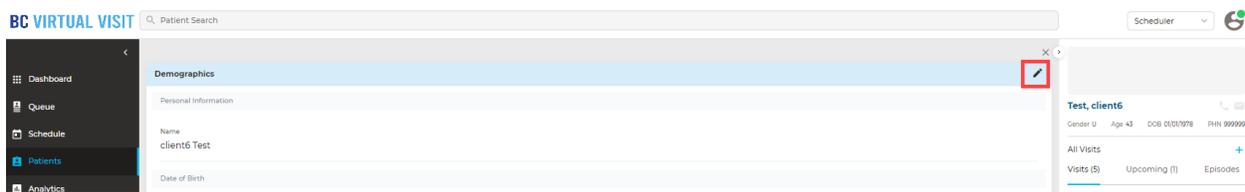
4. Update email as necessary. Click **Save** at the bottom of the profile to capture any changes.

Last updated: May 14, 2021